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SERVING THE TOTAL FOODSERVICE INDUSTRY

MARCH 27, 1991

RESTAURANTS & INSTITUTIONS

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The menu embodies the whole concept of a restaurant, its business plan and marketing strategy, all of its efforts to appeal to consumer tastes and succeed financially. *R&I*'s "Menus for the '90s" presents the keys to survival in foodservice today.

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Menu-part distinctions blur as appetizers, soups, sides and salads are treated as entrees, and all dishes are pepped up and punched with flavor.

MENUS & MARKETS

Customers change so fast, it can make your head swim. But building a menu that follows those changes is essential to keeping your head above water.

By Brian Quinton

The first baby boomers turn 50 in five years. One of every four adults now eating away from home orders a takeout meal. Salmon dishes are as popular on today's menus as beef stroganoff and chop suey were in 1970. And the fastest-growing demographic group of the '90s will be those over 85; the ranks of the "old-old" will swell by 42% in that period.

Is your menu ready for all this?

Marketing the menu begins with learning your market. And that's the problem; the foodservice customer base has gone through some quicksilver changes in recent years. Population shifts have altered its look, lifestage and ethnic makeup. Economic dislocations have changed its spending habits. Compared to 10 years ago, consumer tastes are more eclectic, more willing to accept higher flavor profiles and more "exotic" dishes. At the same time, today's diners bring an entirely new set of social attitudes through the front door: attitudes about nutrition and the part that dining out plays in their enjoyment of life.

Most of all, they are *fragmented*. As with every other product, foodservice marketing has been forced to switch targets over the decades — from traditional families in the '60s to nontraditional households in the '70s and early

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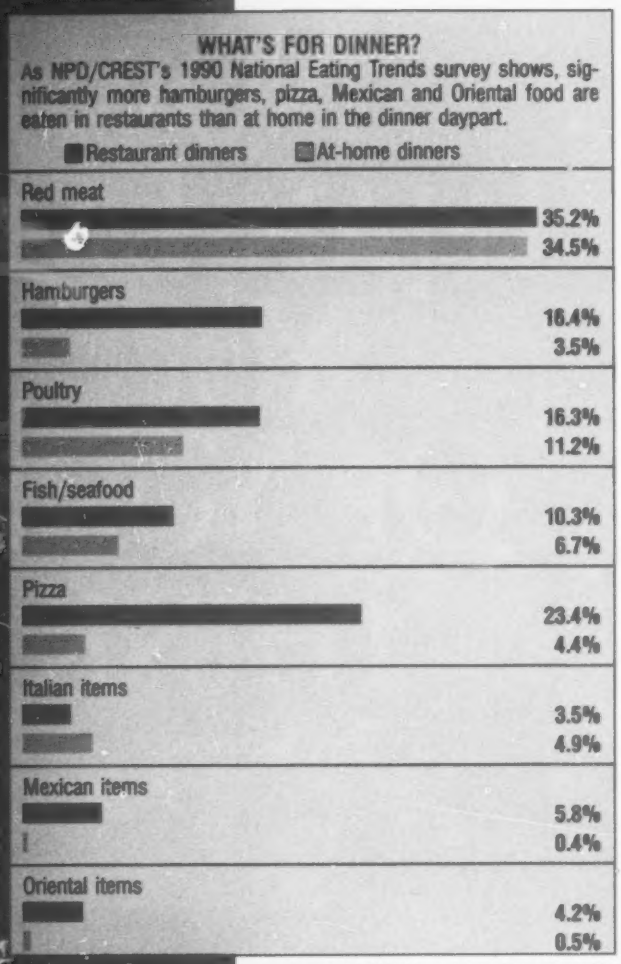
WHAT'S FOR DINNER?

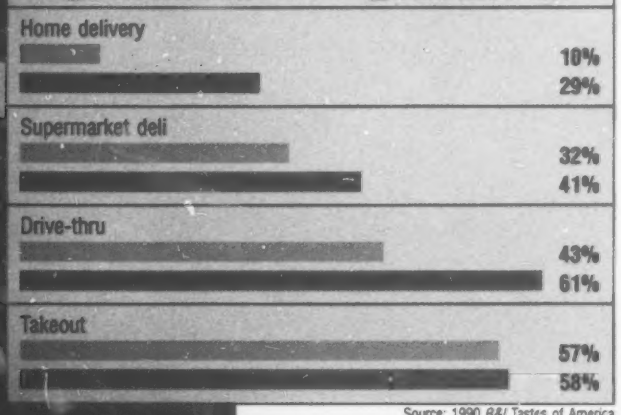
As NPD/CREST's 1990 National Eating Trends survey shows, significantly more hamburgers, pizza, Mexican and Oriental food are eaten in restaurants than at home in the dinner daypart.



Source: NPD CREST National Eating Trends survey 1990

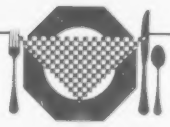
FOR HERE OR TO GO?

The proportion of the public who consume their orders off the premises has increased over the last six years. But takeout only inched up, while home delivery and drive-thru sped ahead.



Source: 1990 *R&I* Tastes of America

Eclectic menus like Bub City's (l.) in Chicago offer patrons high flavor.



THE '90s MENU GIVES THE CUSTOMER CONTROL

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'80s. Today the most effective marketing takes aim at the *individual* as the primary unit of consumption.

CHANGING TASTES

For the last two decades, *R&I* has tracked the popularity of specific foods up and down the average menu. For example, chicken fillets were not part of the average menu 20 years ago; today they can be found on 63% of all menus. Chicken nuggets also came from nowhere two decades ago to appear on 40% of all current menus. But fried chicken, which was on about three-quarters of all menus in the early '70s, dropped to half of all menus by the late '80s.

As might be expected, many of the most dramatic increases over those years came in lighter fare or dishes favored by calorie- and cholesterol-counters. Gazpacho, catfish, salmon, broccoli and decaffeinated coffee posted big gains. But big declines befell items deemed trouble by the health-conscious: beef stroganoff, Russian dressing, chop suey and egg-salad sandwiches, for example.

But the diet dichotomy lives. Cheesecake went from 41% of all menus in the '70s to 62% by 1989. And pizza, cheeseburgers and ice cream have never fallen out of public favor. Certain desserts have fared equally well. Ice cream is an American perennial. The *R&I* Menu Census found it on 64% of all menus in 1970, and on 67% of them in 1989.

American consumers are also opting for more flavor in their foods, both at home and away. U.S. diners consumed a record-setting 762 million pounds of spices in '89—almost 20% more than in '88.

Part of that increase is due to the growing popularity of spicier, more authentic ethnic and regional foods. A 1989 survey done by the National Restaurant Association showed that of 635 adults surveyed, 40% had ordered a Chinese, Mexican or Italian meal in the preceding month. Six percent to 10% had gone out in the same period for Japanese, Latin American or European cuisine (French, Spanish, German, Greek). And 3% or less said that during the prior month they had sampled the more arcane "third tier" of ethnic cuisines at a Caribbean, Middle Eastern, Thai, Korean, Vietnamese, Scandinavian, Russian or African restaurant.

What about the recent past? According to a study published in September 1990 by NPD/CREST, Park Ridge, Ill., one of last year's

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GROWTH OF THE AMERICAN MENU

Broccoli's up—despite a presidential veto. Fried chicken's down. And the cheeseburger is always with us. Back in 1970, *R&I* began asking commercial and institutional operators what they put on their menus, and we have kept an eye on the American bill of fare ever since. Here is a selection of the most interesting moves up—and down—the menu.

Item	On % of menus in '70s	early '80s	late '80s
Cottage cheese	70.5%	62.5%	45.7%
Guacamole	9.0	11.6	21.1
Nachos	—	8.1	36.0
Potato skins	—	8.8	25.0
Consommé	31.8	27.4	22.0
Gazpacho	7.4	12.2	24.7
Bean salad	5[illegible]	41.4	23.9
Spinach salad	28.2	38.1	41.8
Ranch dressing	—	28.7	51.2
Italian dressing	51.1	67.9	75.1
Russian dressing	34.8	29.0	21.1
Beef stroganoff	40.6	38.3	26.9
Chop suey	40.0	35.4	21.9
Chicken fillets	—	40.4	62.9
Chicken nuggets	—	21.3	40.5
Fried chicken	73.6	66.0	51.1
Turkey roll	38.3	29.5	14.8
Catfish	11.5	15.2	39.5
Salmon	25.9	30.2	40.5
Calamari	3.6	5.1	12.2
Pizza	31.1	38.2	43.9
Baked beans	57.8	53.0	41.0
Broccoli	49.1	59.4	66.0
Corn on cob	46.8	40.7	33.0
Cheeseburger	70.2	72.7	73.8
Egg-salad sandwich	53.1	48.6	35.8
Gyro	6.5	7.9	15.0
Seafood-salad sandwich	—	16.2	33.7
Sloppy joe	39.3	35.9	24.1
Cooked cereal	48.5	36.1	44.6
Omelet	47.3	37.6	44.6
Bagel	12.2	20.3	38.7
Breakfast potatoes	41.7	40.2	50.0
Prunes	48.5	27.6	20.4
Yogurt	—	14.8	25.8
Decaffeinated coffee	65.0	69.8	83.3
Iced tea	70.9	78.1	84.9
Low-fat milk	44.2	50.3	60.2
Mineral water	12.1	19.1	38.2

Source: *R&I* Menu Census, 1970-1989

Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

NEW TARGET MARKET: THE INDIVIDUAL

continued from page 16

Fathers as care-givers

growth heroes was exactly that. The hero sandwich increased its share of total restaurant orders by 20%. Poultry sandwiches and Oriental and Mexican items also registered big gains among restaurant diners. On the down side, fish sandwiches fell off 16% between '89 and '90, as did breakfast doughnuts and sweet rolls.

And the NRA ethnic study shows that Oriental food—which ranks behind Mexican in the percentage of dinner orders away from home, and behind Italian in dinners eaten at home—is nevertheless the top ethnic takeout cuisine. One-quarter of those surveyed ordered Oriental takeout in the prior month, compared to 17% each for Mexican and Italian.

CHANGING FACES

Think of the baby-boom generation as the pea in the old shell game. Every time you think you know where it is, it's moved. Right now, baby boomers are departing the lucrative 25-to-34 age bracket that helped fine dining hit its mid-'80s heights. That age group is now the address of the Baby Bust, those born from 1965 to '76; and that promises a 15% drop in this market through the '90s.

Adding insult to injury, the greatest decrease in growth

Teen market in eclipse

rate from now until the year 2000 will occur among teens and young adults—another once-prime source of restaurant diners. By the turn of the century, the 18-to-24 population will be 4% smaller than it is today.

But operators needn't squeeze too hard to turn these demographic lemons into lemonade. There's *good* news out there too. For one thing, most baby-boomer households have children right now. More than 4 million babies were born in 1989, the greatest number since '64. Of older boomer parents (45 to 64), 26% have children under 18; 21% live with children age 21 to 24. Having delayed everything from graduation to marriage to childbirth, baby boomers are now more disposed to spend time with their offspring in family pursuits—including eating out.

Keep your eye on that 45-to-64 market, the one with the fewest responsibilities at home and the most income to spend on indulgences. It will grow a whopping 46% by the year 2000. Taken together with the 35-to-44, they will make up more than two-thirds of the U.S. population by 2000 and will control more than half its spending power.

If that's not enough, the leading edge of the baby

Working women wield clout

boomlet that began in '77 entered their teens last year. By the turn of the century, you'll see 15% more of the 13-to-17 group than you do today.

But this talk about demographic groups ignores that one overriding trend, market fragmentation. Slower population growth means tighter competition for top-spending blocs like the boomers. Operators can dive into that fray and hope to survive, or they can reach beyond the marketing mainstream and mine smaller pockets of opportunity.

Here are some notable splinter markets for the '90s and beyond:

Women in charge. Career-minded baby-boom women are becoming a major force in the workplace, accruing the trips, business lunches and buying decisions that come with seniority. Working women who want to make families a priority are finding ways to stay on the job while raising kids. And a progressive redefinition of "family" means more and more children are growing up with a single parent—most often, the mother. By 2000, more than half of all children will spend part of their lives in a single-parent home; and a vast majority will not remember a time when their mothers did not work. A related factor: Given

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Hispanics hit the big time

Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

AMERICAN TASTES ARE GETTING HOT

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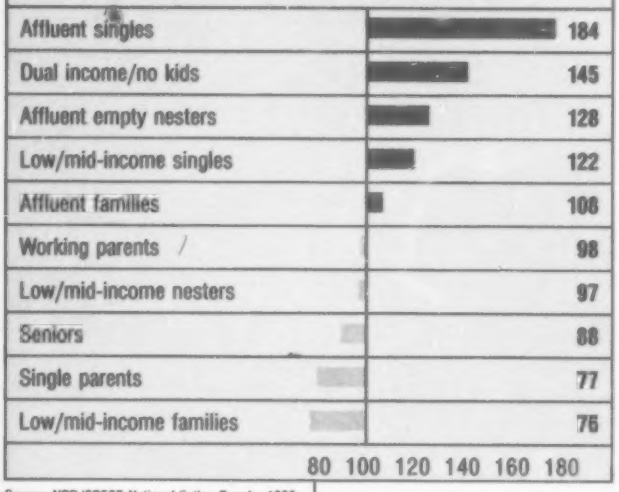
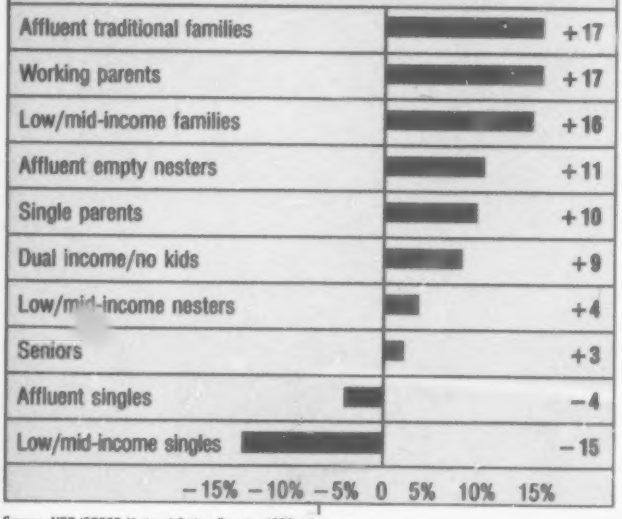
RESTAURANTS' BEST CUSTOMERS . . .
When meal occasions are indexed to a 100 average, well-off singles, DINKs and empty-nesters become operators' best friends, low- or middle-income families their toughest sale.



Source: NPD/CREST National Eating Trends, 1990

. . . AND THOSE GETTING BETTER
They might not rival rich singles yet, but traditional families and working parents hiked their restaurant use most from '84 to '90 (figured by increase in annual visits per person.)



Source: NPD/CREST National Eating Trends, 1990

these situations, many dads will have more care-giving—and kid-feeding—responsibilities than they used to.

The standard mom-pop-and-2.6-kids family is also in decline as a market force. Single-person households, now 25% of the total, are expected to outstrip married-with-children households (27% of total) by the end of the decade.

Grandparents and empty nesters. Get ready for Grandpa and Grandma Boomer. By the end of the century, 33% of all grandparents of children under 18 will be of post-World War II vintage. The generation reared on indulgence finally reaches the lifestage known for spending on *others*. Not that this means a surge of self-denial; many people, upon reaching 50, will find that departing children leave a wake of additional income in need of disposal on cars, home furnishing, travel—and dining out.

Nonwhite "minorities." In 1960, nine out of 10 consumers in America were white; by 2000, that proportion will drop to three out of four. The most rapid growth has been, and will continue to be, in the Hispanic and Asian categories. Hispanics, now about 9% of the U.S. population, posted a 38% growth rate between

■ **By 2000, 50% of all kids will spend time in a one-parent family.**

1980 and 1990 and will be the country's largest minority group by 2010. As for the Asian-American market, its 89% increase from 1980 to 1990 should continue at a comparable rate through 2000.

Operators who wish to catch the next social wave must know how their product appeals to these markets, particularly in the high-growth Sun Belt and West Coast states. For example, nonwhites are much less likely to use a restaurant for eat-in dining than for take-out, and much more likely to go out for dinner than for lunch. Hispanic consumers tend to seek fast-food restaurants with a high kid-appeal factor (toys, playgrounds), while Asians as a group em-

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Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

HERO SANDWICH IS TODAY'S MENU HERO

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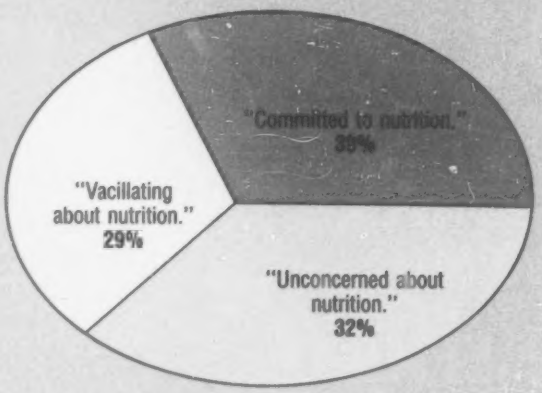
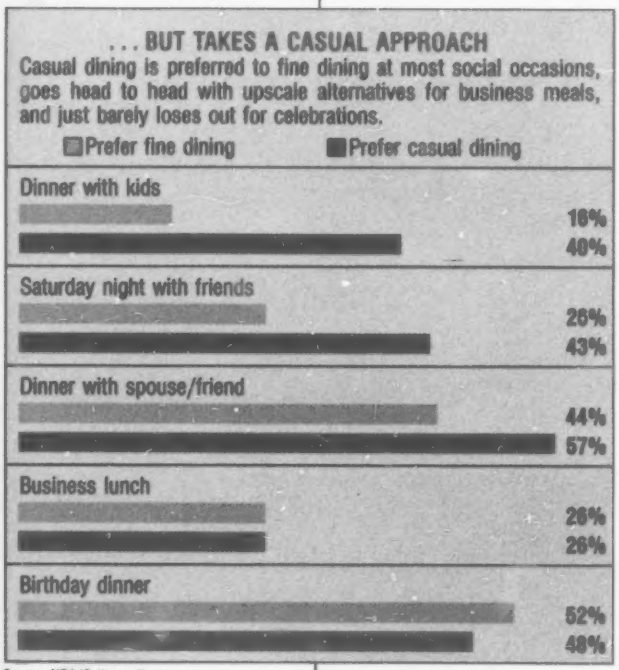
THE PUBLIC'S SPLIT ON HEALTHFUL DIET . . .
An NRA/Gallup survey shows a three-way split among adults on nutrition. The health-conscious enjoy a small lead, but tend to eat out less than the "un-conscious."



Source: National Restaurant Association/Gallup Health and Nutrition Attitudes survey, 1989

. . . BUT TAKES A CASUAL APPROACH
Casual dining is preferred to fine dining at most social occasions, goes head to head with upscale alternatives for business meals, and just barely loses out for celebrations.



Source: NRA/Gallup poll

phasize menu and value more than atmosphere or service.

CHANGING HABITS

Besides keeping an eye on the tastes and demographic makeup of their customers, operators must figure in the social attitudes that affect the way people use restaurants.

Casual preferences. One well-publicized preference is the trend to casual dining. A 1989 survey conducted by the National Restaurant Association and the Gallup organization gave customers a choice between casual restaurants and fine dining for five different types of meal occasions. Result: Customers opted to go casual for three of them—eating out with kids, a Saturday night out with friends, and as an alternative to cooking at home.

And casual patrons go out to eat more often than their high-end counterparts. Seven out of 10 respondents to the NRA/Gallup poll eat at a casual table-service restaurant once a month or more, compared to four in 10 who use fine dining. Twenty percent had never eaten in an upscale restaurant; all but 6% had eaten in a casual restaurant.

The health-conscious. The other societal trend

■ **Today's diners need a menu as diverse as they are.**

that operators must attend to is a new commitment to health and nutrition. This has received lots of press, of course, and might in fact have been blown out of proportion; just owning a rowing machine doesn't make one a fitness fanatic. But a recent *Advertising Age* survey found that 67% of those polled claimed they did some daily activity that helped keep them physically fit. The same survey in 1985 found 44% willing to say the same.

It makes sense that fitness and health concerns should be on the upswing as the baby boomers move into the 45-to-54 age bracket, with its attendant aches and ailments. (Notably, the exercise most respondents in the *Ad Age* polled espoused was

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Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

MINORITIES, THE MIDDLE-AGED ARE HOT MARKETS

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walking—cheap, aerobic, and easy on the joints.)

A 1989 NRA survey found that 39% of the U.S. adult population described themselves as "committed to nutrition," up slightly from the 35% who said the same in 1986. For the same period, the number who said they were "unconcerned about nutrition" dropped from 38% to 32%, and the undecideds "vacillating" on the importance of good nutrition grew by 2 percentage points to 29% in 1989.

Committed patrons, this study found, are more likely than average to order raw-vegetable appetizers, skinless poultry, broiled or baked fish, low-fat yogurt and whole-grain breads. They believe restaurant menus should include choices for special diets. To no one's surprise, unconcerned patrons are more-than-average consumers of rich desserts, steak and roast beef, regular soft drinks, fried fish and premium ice cream.

And the undecideds? They're taking a bit from both of those menus. They order lean meats, low-salt items and decaffeinated coffee more often than the average customer. But they can also be tempted with rich desserts, premium ice cream, regular soft drinks, steak and roast beef.

What do findings such as these say about the food-service market? Once again, customers are moving toward diversity and individualized control: They want *what* they want, *when* and *how* they want it. That's a tall order indeed. But by building a little foresight and flexibility into the menu, a savvy operator can give diners what they want about as fast as they know they want it.

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DAYPARTS: ROUND-THE-CLOCK SALES BUILDERS

A new menu or new menu items can put a shine to lackluster dayparts and create meal occasions—without increasing overhead or raising prices.

Breakfast remains the daypart with a big growth potential. After a growth spurt between 1985-1987, commercial breakfast business reached a plateau. It currently represents 11.6% of the market (according to Park Ridge, Ill.-based NPD/CREST).

A.M. STRATEGIES

Successful strategies for adding breakfast business include revitalizing breakfast and brunch menus with contemporary (including "light") items, adding a service twist, courting a target market such as children and seniors with special menu items and smaller portions, catering to business with breakfast meetings, and offering breakfast items to go.

The idea of fast, convenient breakfasts might have originated in fast-food and family-dining chains, but it moved quickly to other foodservice segments. La Mirada, Calif.-based Denny's (where menu items that have a 10-minute-or-they're-free service guarantee are marked by a stopwatch), might have its record, if not its volume, bettered by the Waldorf-Astoria in New York, which promises *60-second service* on its Continental breakfast. (See "Eye Openers.")

SIGNATURE BRUNCH

Brunch, a low-cost meal occasion with a high perceived value, traditionally has been the preserve of hotels, where elaborate brunches are made possible by the built-in advantage of large staffs and facilities. However, restaurants can create a signature brunch. Consider, for example, the New Orleans jazz brunch. This theme brunch, made popular by New Orleans restaurateur Ella Brennan at Commander's Palace, profitably continues in the '90s with the new lighter style of contemporary Cajun-Creole cooking at Mr. B's Bistro. There, her nephew and niece, Ralph and Cindy Brennan, and Chef Gerard Maras turn out a successful brunch menu with traditional drinks and sides and specially plated items: For example, an andouille, spinach and Cheddar omelet ($10.95), spicy barbecued shrimp ($13.75), and Eggs One and One (one Egg Benedict, one Egg Creole), or fried eggplant round topped with a poached egg, Creole sauce and served with andouille ($10.25). These are served with gumbo or fresh fruit, tea or coffee.

CORPORATE CATERING

Don Clawson, food and beverage vice president, Radisson Hotels International, says that the hotel chain considers its breakfast a success if traffic in a la cart outlets reaches 60% or more of guests, and if room service reaches 15% or more.

In 1985, he says, Radisson

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BREAKFAST TAKES

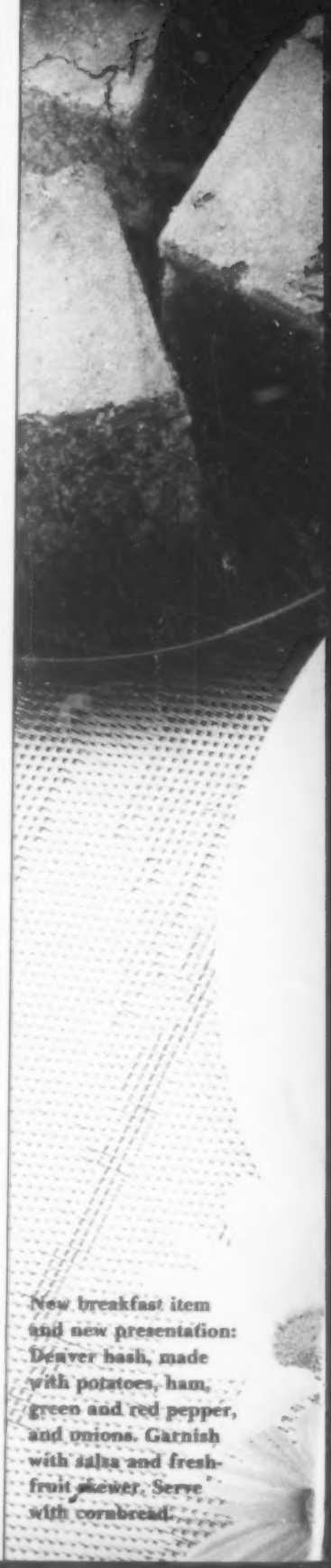
As customer traffic by meal occasion (below, expressed by percentage) shows, breakfast still represents the smallest slice of the commercial foodservice pie (1990 figures).

Meal occasion	Traffic
Breakfast	11.6%
Lunch	36.3
Dinner	41.3
Snacks	10.8

Source: NPD/CREST

But in a recent *R&I* survey of 33,165 institutional operators, breakfast proved a popular meal occasion.

Institution	Serves breakfast
Hospitals/Nursing homes	90.4%
Colleges/ Universities	90.0
Schools	84.8
Contract feeders	71.6
Self-op in-plant	59.6
U.S. government	50.0



New breakfast item and new presentation: Denver hash, made with potatoes, ham, green and red pepper, and onions. Garnish with salsa and fresh-fruit skewer. Serve with cornbread.

Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

POPULAR FOODS CAN BE DAYPART BRIDGES

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opened its private dining rooms, which seat 10-20, for catered corporate breakfast meetings for in-house guests or local businesses. "It has been very successful," he says, estimating that the private dining rooms average 50% occupied.

INSTITUTIONAL TAKEOUT, TOO

Growth in takeout and delivery is a well-documented trend, and the institutional segment has not been slow to capitalize on it. When schedule changes at the Portland, Ore., school district meant less time for breakfast, participation dropped from 8,500 to 6,000. But when Foodservice Director Bob Honson implemented a menu of portable breakfast foods, participation increased 15%-20%. In addition to fruit, juices and milk, the program offers hand-held to-go items such as whole-wheat cinnamon rolls with fruit fillings.

The principle applies to older students as well. "Our kids will eat just about anything that they can pick up, for example, hash-brown potatoes in squares, triangles or patties," says Ted Smith, foodservice coordinator at Michigan State University, East Lansing. He also notes an increase in demand for muffins. One addition is a carrot-zucchini-nut muffin larger than a cupcake.

MENU BRIDGES

The practical, profitable idea of dishes that can serve more than one meal period probably started with the 24-hour breakfast houses. Certainly, eggs are one of the six great popular foods that can serve more than one meal period.

Low-cost eggs go from breakfast to lunch to dinner, changing their seasonings, sauces, accompaniments and style as they go. Poached or scrambled for breakfast, they appear as egg salad for lunch and as the lunch or dinner omelet or quiche.

Soup can be a starter, part of a lunch combo (soup-sandwich, soup-salad), or a one-dish dinner entree. It can be a breakfast course, as is the miso soup served at the Radisson Hotel, San Diego.

Sandwiches go from breakfast with eggs and cured breakfast meats to lunch with endless fillings, both open- and close-face, and to dinner with hot meat and gravy sandwiches, and hearty steak sandwiches.

Salads, once a side dish, now span the menu from appetizers to main-dish lunch and dinner salads. And noodle this: Pastas, which also can be appetizers, side and main dishes, also might be main-dish salads.

Pizza, historically one of the first courses in a traditional Italian meal, is now an appetizer, or a main course for lunch and dinner. Now the '90s find it making its appearance at breakfast.

■ **Pizza is one of the six great dishes that span two or more meal periods.**

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SIX MENU BRIDGES

EGGS: Frittata of the Day. Lunch plate served with french fries, choice of corn biscuit, muffin or toast . . . Market price
—Coco Nuts, Sausalito, Calif.

SOUP: Soup, salad and fruit bar. All you care to eat from more than 40 items. Dinner offering . . . $3.79
—Shoney's Inc., Nashville, Tenn.

SANDWICH: Steak sandwich. Dinner item of top sirloin steak broiled to order, served open-face with french fries and soup or salad . . . $6.95
—Lyon's Restaurants Inc., Foster City, Calif.

SALAD: Country shrimp salad in sweet-potato biscuit with melon relish. A luncheon main course . . . $15.50
—The Mansion on Turtle Creek Restaurant, Dallas

PASTA: Pasta with shrimp, artichokes and country ham. A lunch entree . . . $7.50
—Jilich's, Charleston, S.C.

PIZZA: Pizza Prima Colazione. Brunch bacon and eggs pizza . . . $5.95
—Convito Italiano, Chicago

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DESSERT SALES ARE SWEETER THAN EVER

SWEET POPULARITY

No matter what restaurant customers *say* about dieting, what they *do* is desserts. Figures don't lie: According to NPD/CREST, desserts represent 13.6% of all servings of food in restaurants. Desserts growing in popularity in 1990 were:

Servings	% increase
Frozen yogurt	33.0%
Cookies	11.8
Pies, cakes, pastries	1.0
Total desserts	2.8

Although the increase in pies, cakes and pastries might seem small by comparison, it is the frosting on a four-year growth trend:

Servings of pies, cakes, pastries	
Year	% increase
1987	5.5%
1988	1.4
1989	2.9
1990	1.0

Source: NPD/CREST

The dessert menu, like the appetizer menu, is growing in length and breadth with more items and greater variety. Portions are larger, and the trend is American home-style desserts—presented on a pastry tray or cart.

Says Jean Paison, pastry chef for Illinois Street Emporium, a deli and bakery in Indianapolis: "Our customers will order a salad or simple broiled fish and call it lunch—just so they can have one of our desserts." Paison says that European pastries are out and that large, rich desserts are in. Tart and cake slices sell for $3.95 but, she says, in a different market (for instance, New York, Chicago or Los Angeles), the same portion would sell for $5.95.

Marjorie Johnson, pastry chef and partner in Walter's restaurant in Park Ridge, Ill., (where desserts do sell for $5.95 per serving) agrees. Every day the pastry tray with a dozen different desserts—portioned and plated—is brought to customers' tables by wait staff, who rely on it as a selling tool. Dessert portions are very large and selections range from towering banana mousse cake (a rich update of banana cream pie), to apple crisp, served warm in a skillet with a whiskey sauce.

When signature desserts are shown on tray to customers at Walter's, 90% can't resist.

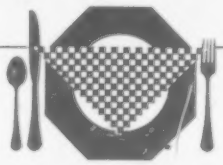
"If customers will let the dessert tray come to the table, 90% of them will order a dessert," says Johnson.

A national sampler of hot-selling home-style desserts:

- Hot Chocolate Chip Pie á la Mode with Fudge Sauce, $3.95 (Steven Wade's Cafe, New Berlin, Wis.)
- Apple Dumpling with Cinnamon Sauce, $1.99 (Perkins, Memphis, Tenn.)
- Strawberry Pound Cake Sundae, $2.95 (Pancake Cottage, North Massapequa, N.Y.)
- Atomic Chocolate Cake, $3.50, and Tollhouse Cookie Sundae, $3.95 (The Fireworks Factory, Lake Buena Vista, Fla.)
- Lemon Squares, $1.50, and Chocolate Fudge Cake, $2.50 (Corrado Kitchen, New York).

Menus for the '90s require a variety of new products. The *R&I Marketplace Sourcebook* is in the mail. Watch for it!

R&I's MENUS FOR THE '90s



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